

PHA Plans

Streamlined 5-Year/Annual Version

U.S. Department of Housing and
Urban Development
Office of Public and Indian Housing

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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

Streamlined Annual Plan for Fiscal Year 2005

HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Housing Authority of the County of San Bernardino

PHA Number: CA019

PHA Fiscal Year Beginning: (mm/yyyy) 10/2004

PHA Programs Administered:

☒ **Public Housing and Section 8**

Number of public housing units: 1,710

Number of S8 units: 8,304

☐ **Section 8 Only**

Number of S8 units:

☐ **Public Housing Only**

Number of public housing units:

☐ **PHA Consortia:** (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting:

- ☒ Main administrative office of the PHA
- ☒ PHA development management offices
- ☒ PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans and attachments (if any) are available for public inspection at:

- ☒ Main administrative office of the PHA
- ☒ PHA development management offices
- ☒ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☐ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at:

- ☒ Main business office of the PHA
- ☒ PHA development management offices
- ☐ Other (list below)

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

- ☐ The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- ☒ The PHA's mission is: (state mission here)
To help low-income individuals and families in San Bernardino County by providing and promoting affordable housing, housing assistance payment programs, self-sufficiency programs, safe housing environments, and homeownership opportunities.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAs ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- ☒ PHA Goal: Expand the supply of assisted housing
Objectives:
- ☒ Apply for additional rental vouchers
 - ☒ Reduce public housing vacancies
 - ☒ Leverage private or other public funds to create additional housing opportunities
 - ☒ Acquire or build units or developments
 - ☒ Other (list below)
 - Increase the Housing Authority's seniors' housing stock by eight percent
 - Increase the Housing Authority's non-HUD affordable housing stock by 10 percent

B. Goals

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- ☒ PHA Goal: Improve the quality of assisted housing
Objectives:
- ☒ Improve public housing management: (PHAS score)
 - ☒ Improve voucher management: (SEMAP score)
 - ☒ Increase customer satisfaction
 - ☒ Concentrate on efforts to improve specific management functions
(list; e.g., public housing finance; voucher unit inspections)
 - ☒ Renovate or modernize public housing units
 - ☐ Demolish or dispose of obsolete public housing
 - ☐ Provide replacement public housing
 - ☐ Provide replacement vouchers
 - ☒ Other: (list below)
 - Increase resident satisfaction with maintenance services by 15 percent
- ☒ PHA Goal: Increase assisted housing choices
Objectives:
- ☒ Provide voucher mobility counseling:
 - ☒ Conduct outreach efforts to potential voucher landlords
 - ☒ Increase voucher payment standards
 - ☒ Implement voucher homeownership program:
 - ☒ Implement public housing or other homeownership programs:
 - ☒ Implement public housing site-based waiting lists:
 - ☐ Convert public housing to vouchers:
 - ☒ Other: (list below)
 - Implement memorandum agreements with other housing authorities within the county and adjacent counties to increase voucher mobility and reduce administrative workload by ten percent

B. Goals

HUD Strategic Goal: Improve community quality of life and economic vitality

- ☒ PHA Goal: Provide an improved living environment
- Objectives:
- ☒ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - ☒ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - ☒ Implement public housing security improvements:
 - ☒ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - ☒ Other: (list below)
 - Improve safety awareness and resident satisfaction in Housing Authority developments by 20 percent
 - Reduce crime incidents in Housing Authority developments by ten percent
 - Improve relations between established resident groups and law enforcement services

HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals

- ☒ PHA Goal: Promote self-sufficiency and asset development of assisted households
- Objectives:
- ☒ Increase the number and percentage of employed persons in assisted families:
 - ☒ Provide or attract supportive services to improve assistance recipients' employability:
 - ☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
 - ☒ Other: (list below)
 - Develop partnerships with community service providers to improve economic advancement, self-sufficiency, and home ownership achievement by our public housing tenants and housing choice voucher participants.
 - Develop partnerships with non-profit organizations and local universities to train and/or employ residents enrolled in Housing Authority sponsored Welfare-to-Work programs

B. Goals

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- ☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
- ☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - ☒ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - ☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - ☐ Other: (list below)

Other PHA Goals and Objectives: (list below)

- Increase efficiency of conventional housing portfolio management by implementing the 24 CFR 906 Homeownership Program and selling scattered site single-family homes to low-income families who are between 50 and 80 percent of average median income.
- Implement a homeownership program in partnership with San Bernardino County by developing affordable housing units for resale.
- Increase by 15 percent housing choice voucher homeownership program participation by assisting eligible participants in qualifying for bank loans.
- Perform cost analysis studies to determine the feasibility of converting selected conventional housing developments to the Housing Choice Voucher Program.
- Increase case management efficiency and reduce assisted housing program operating costs through computerization of repetitive administrative tasks.
- Increase efficiency in public housing management through the integration of HUD-50058, work order, inventory, and tenant accounting software.

Streamlined Annual PHA Plan

PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

Table of Contents

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

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B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50077, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans;

Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.

For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:

Form HUD-50070, Certification for a Drug-Free Workplace;

Form HUD-50071, Certification of Payments to Influence Federal Transactions;

Form SF-LLL & SF-LLLa, Disclosure of Lobbying Activities.

Executive Summary

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan.

This Annual Plan details our strategy for addressing affordable housing needs of low-income families in San Bernardino County. As the largest geographic county within the continental United States, our jurisdiction covers 39 cities in our Housing Choice Voucher program and 23 cities in our public housing programs. Approximately nine percent of the 2,100,000 County residents are at the extremely low- or very low-income categories.

Our strategy to address the extremely high demand for affordable housing was designed within funding constraints and available financial resources. Since the Department of Housing and Urban Development (HUD) is our primary funding source, this Annual Plan incorporates HUD requirements for eligibility, assistance, operation, and management of public housing and assisted housing programs. The plan also includes our plan of action to promote self-sufficiency and to reduce crime and safety problems within our developments.

Our major initiatives include development and acquisition of affordable housing units for the elderly and qualified low-income families, implementation of homeownership programs in public housing and housing choice vouchers, and providing affordable housing units in a non-discriminatory and safe environment.

1. Statement of Housing Needs [24 CFR Part 903.12 (b), 903.7(a)]

A. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	12,478		1,261
Extremely low income <=30% AMI	9,088	73	
Very low income (>30% but <=50% AMI)	2,940	24	
Low income (>50% but <80% AMI)	249	2	
Families with children	7,217	58	
Elderly families	1,036	8	
Families with Disabilities	We do not capture this data.		
Race/ethnicity	Since the applicant can decline to answer about race, we cannot provide accurate data.		
Race/ethnicity			
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 29			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

1. Statement of Housing Needs

A. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	11,777		217
Extremely low income <=30% AMI	9,271	79	
Very low income (>30% but <=50% AMI)	1,977	17	
Low income (>50% but <80% AMI)	388	3	
Families with children	6,114	52	
Elderly families	994	8	
Families with Disabilities	922	8	
Race/ethnicity	Since the applicant can decline to answer about race, we cannot provide accurate data.		
Race/ethnicity			
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	2,890	25	
2 BR	5,704	48	
3 BR	2,588	22	
4 BR	521	4	
5 BR	74	1	
5+ BR	0	0	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

1. Statement of Housing Needs

B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off-line
- ☒ Reduce turnover time for vacated public housing units
- ☒ Reduce time to renovate public housing units
- ☐ Seek replacement of public housing units lost to the inventory through mixed finance development
- ☐ Seek replacement of public housing units lost to the inventory through Section 8 replacement housing resources
- ☐ Maintain or increase Section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- ☐ Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- ☒ Maintain or increase Section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- ☒ Maintain or increase Section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- ☐ Other (list below)

Strategy 2: Increase the number of affordable housing units by:

Select all that apply

- ☒ Apply for additional Section 8 units should they become available
- ☒ Leverage affordable housing resources in the community through the creation of mixed - finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- ☒ Other: (list below)
 - Develop and/or acquire affordable housing units through leveraging, use of available development funds, and partnerships with cities in San Bernardino County.

1. Statement of Housing Needs

B. Strategy for Addressing Needs

Need: Specific Family Types: Families at or below 30% of median

Strategy 1: Target available assistance to families at or below 30 % of AMI

Select all that apply

- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based Section 8 assistance
- ☐ Employ admissions preferences aimed at families with economic hardships
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

Need: Specific Family Types: Families at or below 50% of median

Strategy 1: Target available assistance to families at or below 50% of AMI

Select all that apply

- ☒ Employ admissions preferences aimed at families who are working
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- ☒ Seek designation of public housing for the elderly
- ☒ Apply for special-purpose vouchers targeted to the elderly, should they become available
- ☒ Other: (list below)
 - Develop elderly public housing through joint ventures

1. Statement of Housing Needs

B. Strategy for Addressing Needs

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- ☐ Seek designation of public housing for families with disabilities
- ☒ Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- ☒ Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- ☒ Affirmatively market to local non-profit agencies that assist families with disabilities
- ☒ Other: (list below)
 - Work with non-profits that target housing assistance to families with disabilities

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

- ☒ Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- ☐ Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- ☒ Counsel Section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- ☒ Market the Section 8 program to owners outside of areas of poverty /minority concentrations
- ☐ Other: (list below)

1. Statement of Housing Needs

B. Strategy for Addressing Needs

Other Housing Needs & Strategies: (list needs and strategies below)

(2) Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☒ Funding constraints
- ☒ Staffing constraints
- ☐ Limited availability of sites for assisted housing
- ☐ Extent to which particular housing needs are met by other organizations in the community
- ☒ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☒ Influence of the housing market on PHA programs
- ☐ Community priorities regarding housing assistance
- ☒ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☒ Results of consultation with advocacy groups
- ☐ Other: (list below)

2.. Statement of Financial Resources

[24 CFR Part 903.12 (b), 903.7 (c)]

List on the following table the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	3,889,600	
b) Public Housing Capital Fund	4,545,200	
c) HOPE VI Revitalization	- 0 -	
d) HOPE VI Demolition	- 0 -	
e) Annual Contributions for Section 8 Tenant-Based Assistance	59,344,831	
f) Resident Opportunity and Self-Sufficiency Grants	165,800	
g) Community Development Block Grant	- 0 -	N/A
h) HOME	- 0 -	N/A
Other Federal Grants (list below)	N/A	N/A
2. Prior Year Federal Grants (unobligated funds only) (list below)		
a) Shelter Plus Care	2,278,200	Section 8 Tenant-Based Assistance
b) Resident Opportunities & Self-Sufficiency	580,000	Public Housing Supportive Services
3. Public Housing Dwelling Rental Income		
a) Conventional Program	4,637,600	Public Housing Operations
b) Authority-Owned Public Housing	5,361,400	Public Housing Operations
4. Other income (list below)		
Interest / Miscellaneous Income	1,291,800	Public Housing Operations
5. Non-federal sources (list below)	N/A	N/A
Total resources	82,094,431	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.12 (b), 903.7 (b)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

(1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- ☒ When families are within a certain number of being offered a unit: (state number) 20
☒ When families are within a certain time of being offered a unit: (state time) 30 days
☐ Other: (describe)

b. What non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- ☒ Criminal or Drug-related activity
☒ Rental history
☒ Housekeeping
☒ Other (describe)
 - Credit history

c. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. ☐ Yes ☒ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ☒ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2) Waiting List Organization

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- ☐ Community-wide list
☐ Sub-jurisdictional lists
☒ Site-based waiting lists
☐ Other (describe)

b. Where may interested persons apply for admission to public housing?

- ☐ PHA main administrative office
☒ PHA development site management office
☐ Other (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(2) Waiting List Organization

c. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d.

Site-Based Waiting Lists				
Development Information: (List number, Development number, location)	Date Initiated	Initial mix of Racial, Ethnic or Disability Demographics	Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL	Percent change between initial and current mix of Racial, Ethnic, or Disability demographics
1) 4, 17, 32, 40 Colton, Rialto, Loma Linda	6/1/1999	Unknown	Waiting list program does not capture this type of information. Application does not request this type of Information in adherence to the California Fair Employment and Housing Act.	Unknown
2) 10 Colton	6/1/1999			
3) 2 Eastern San Bernardino	6/1/1999			
4) Scattered Sites San Bernardino, Rialto, Fontana	6/1/1999			
5) Scattered Sites Redlands, Yucaip	6/1/1999			
6) 7, 12, 13, 34, 35 Barstow	6/1/1999			
7) 22, 31, 32, 34, 35 Victorville, Apple Valley, Hesperia	6/1/1999			
8) 42 Adelanto	6/1/1999			
9) 3, 18, 19 Western San Bernardino	6/1/1999			
10) 17, 32, 42 Bloomington, Ontario	6/1/1999			
11) 6, 17, 20, 21, 35, 36, 42 Rancho Cucamonga, Montclair, Chino	6/1/1999			
12) 25, 28, 29, 31, 35 Yucca Valley, 29 Palms, Joshua Tree	6/1/1999			
13) 1, 8 Redlands	6/1/1999			
14) 5, 9 Redlands	6/1/1999			

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(2) Waiting List Organization

c. Site-Based Waiting Lists-Previous Year

2. What is the number of site based waiting list developments to which families may apply at one time? 14

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? 1

4. ☐ Yes ☒ No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection (3) **Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year? 14

2. ☐ Yes ☒ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
If yes, how many lists?

3. ☒ Yes ☐ No: May families be on more than one list simultaneously
If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- ☒ PHA main administrative office
- ☒ All PHA development management offices
- ☒ Management offices at developments with site-based waiting lists
- ☒ At the development to which they would like to apply
- ☐ Other (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- ☒ One
☐ Two
☐ Three or More

b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

a. Income targeting:

☐ Yes ☒ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions? (list below)

- ☒ Emergencies
☒ Over-housed
☒ Under-housed
☒ Medical justification
☒ Administrative reasons determined by the PHA (e.g., to permit modernization work)
☐ Resident choice: (state circumstances below)
☒ Other: (list below)
 - To gain or maintain employment
 - Education leading to greater self-sufficiency

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection (5) Occupancy)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☐ Working families and those unable to work because of age or disability
- ☒ Veterans and veterans' families
- ☒ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☒ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

c. Preferences

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

☒ 4 Date and Time

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☒ 1 Veterans and veterans' families
- ☒ 2 Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☒ 3 Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(4) Admissions Preferences

c. Preferences

4. Relationship of preferences to income targeting requirements:

- ☒ The PHA applies preferences within income tiers
☐ Not applicable: the pool of applicant families ensures that the PHA will meet income-targeting requirements

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA-resident lease
☒ The PHA's Admissions and (Continued) Occupancy policy
☐ PHA briefing seminars or written materials
☒ Other source (list)
 - Public Housing Authority brochure

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- ☐ At an annual reexamination and lease renewal
☒ Any time family composition changes
☐ At family request for revision
☐ Other (list)

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(6) Deconcentration and Income Mixing

- a. ☒ Yes ☐ No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.
- b. ☒ Yes ☐ No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

Deconcentration Policy for Covered Developments			
Development Number and Name	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
13-421 S 7 th Ave	89	Some tenants have obtained higher incomes and have not moved out of the developments.	See: Tenant Selection & Assignment Plan (TSAP)
19-5161 Bandara Apts	8	The covered development's size, location, and/or configuration promote income deconcentration, such as scattered sites or small developments.	
23-16988 Reed St.	9		
25-6442 Desert Queen	10		
26-753 Ralston	8		
29-6443 Split Rick	10		
30-1409 S Euclid	10		
32-Scattered Sites	102		
35-Scattered Sites	68		
36-Scattered Sites	19		
42-Scattered Sites	75		

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

Exemptions: PHAs that do not administer Section 8 are not required to complete sub-component 3B.

Unless otherwise specified, all questions in this section apply only to the tenant-based Section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

- ☒ Criminal or drug-related activity only to the extent required by law or regulation
☐ Criminal and drug-related activity, more extensively than required by law or regulation
☐ More general screening than criminal and drug-related activity (list factors):
☒ Other (list below)
 - Outstanding debt to this Housing Authority
 - Megan's Law

b. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. ☐ Yes ☒ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. ☒ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- ☐ Criminal or drug-related activity
☒ Other, if requested in writing, the PHA will furnish prospective owners with the following:
 - The family's current and prior addresses as shown in the PHA records
 - The name and address of the current and prior landlords at the family's current addresses (if available), family's rental history, and any history of drug trafficking.

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(2) Waiting List Organization

- a. With which of the following program waiting lists is the Section 8 tenant-based assistance waiting list merged? (select all that apply)

- ☒ None
☐ Federal public housing
☐ Federal moderate rehabilitation
☐ Federal project-based certificate program
☐ Other federal or local program (list below)

- b. Where may interested persons apply for admission to Section 8 tenant-based assistance?

When an open enrollment is conducted persons may apply at: (select all that apply)

- ☒ PHA main administrative office
☒ Other (list below)
- By telephoning main administrative office during times specified in publicized open enrollments
 - Housing Authority authorized web site
 - Applications will be available in an accessible format upon request from a person with a disability

(3) Search Time

- a. ☒ Yes ☐ No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below:

- When a participant has documented that they have had difficulty finding a unit because of a tight rental market
- When a participant requires reasonable accommodation to complete the lease-up process
- When a participant has medical reasons
- When a participant has submitted their request for tenancy for approval and are waiting for the inspection process to be complete
- When time is required to complete the criminal background check
- When a participant is Porting-In, to allow receipt of proper documentation from the other Housing Authority

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(4) Admissions Preferences

a. Income targeting

- ☐ Yes ☒ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the Section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to Section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose Section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☒ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(4) Admissions Preferences

b. Preferences

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

☐ Date and Time

Former Federal preferences:

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☒ 1 Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)

- ☐ Date and time of application
- ☒ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)

- ☐ This preference has previously been reviewed and approved by HUD
- ☐ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income-targeting requirements

3. PHA Policies Governing Eligibility, Selection, and Admissions

B. Section 8

(5) Special Purpose Section 8 Assistance Programs

- a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose Section 8 program administered by the PHA contained? (select all that apply)

- ☒ The Section 8 Administrative Plan
☒ Briefing sessions and written materials
☐ Other (list below)

- b. How does the PHA announce the availability of any special-purpose Section 8 programs to the public?

- ☒ Through published notices
☒ Other (list below)
 - Advocacy Groups

4. PHA Rent Determination Policies

[24 CFR Part 903.12(b), 903.7(d)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one of the following two)

- ☒ The PHA will not employ any discretionary rent-setting policies for income-based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))
- ☐ The PHA employs discretionary policies for determining income-based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
☐ \$1-\$25
☐ \$26-\$50

2. ☐ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

4. PHA Rent Determination Policies

A. Public Housing

(1) Income Based Rent Policies

c. Rents set at less than 30% of adjusted income

1. ☐ Yes ☐ No: Does the PHA plan to charge rents at a fixed amount or at a percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

☐ For the earned income of a previously unemployed household member

☐ For increases in earned income

☐ Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:

☐ Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:

☐ For household heads

☐ For other family members

☐ For transportation expenses

☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families

☐ Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

☐ Yes for all developments

☐ Yes but only for some developments

☐ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

☐ For all developments

☐ For all general occupancy developments (not elderly or disabled or elderly only)

☐ For specified general occupancy developments

☐ For certain parts of developments; e.g., the high-rise portion

☐ For certain size units; e.g., larger bedroom sizes

☐ Other (list below)

4. PHA Rent Determination Policies

A. Public Housing

(1) Income Based Rent Policies

e. Ceiling rents

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- ☐ Market comparability study
- ☐ Fair market rents (FMR)
- ☐ 95th percentile rents
- ☐ 75 percent of operating costs
- ☐ 100 percent of operating costs for general occupancy (family) developments
- ☐ Operating costs plus debt service
- ☐ The “rental value” of the unit
- ☐ Other (list below)

f. Rent re-determinations:

Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- ☐ Never
- ☐ At family option
- ☐ Any time the family experiences an income increase
- ☐ Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
- ☐ Other (list below)

g. ☐ Yes ☐ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

a. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☒ The Section 8 rent reasonableness study of comparable housing
- ☒ Survey of rents listed in local newspaper
- ☒ Survey of similar unassisted units in the neighborhood
- ☐ Other (list/describe below)

4. PHA Rent Determination Policies

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based Section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below 100% of FMR
- ☐ 100% of FMR
- ☒ Above 100% but at or below 110% of FMR
- ☐ Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- ☒ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☒ Reflects market or submarket
- ☒ To increase housing options for families
- ☐ Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- ☒ Annually
- ☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- ☒ Success rates of assisted families
- ☒ Rent burdens of assisted families
- ☐ Other (list below)

4. PHA Rent Determination Policies

B. Section 8 Tenant-Based Assistance

(2) Minimum Rent

a. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
☐ \$1-\$25
☒ \$26-\$50

b. ☒ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

- (i) When the family has lost eligibility for or is awaiting an eligibility determination for a federal, state, or local assistance program, including a family that includes a member who is a non-citizen lawfully admitted for permanent residence under the Immigration and Nationality Act who would be entitled to public benefits but for title IV of the Personal Responsibility and Work Opportunity Act of 1996;
- (ii) When the family would be evicted because it is unable to pay the minimum rent;
- (iii) When the income of the family has decreased because of changed circumstances, such as loss of employment;
- (iv) When a death has occurred in the family; and
- (v) Other hardship circumstances determined by the Housing Authority or HUD.

5. Capital Improvement Needs

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

(1) Capital Fund Program

- a. ☒ Yes ☐ No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.
- b. ☐ Yes ☒ No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

5. Capital Improvement Needs

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 5B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

(1) Hope VI Revitalization

- a. ☐ Yes ☒ No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)
Development name:
Development (project) number:
Status of grant: (select the statement that best describes the current status)
☐ Revitalization Plan under development
☐ Revitalization Plan submitted, pending approval
☐ Revitalization Plan approved
☐ Activities pursuant to an approved Revitalization Plan underway
- c. ☐ Yes ☒ No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. ☐ Yes ☒ No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:
- e. ☐ Yes ☒ No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

6. Demolition and Disposition

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

- a. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If “No”, skip to component 7; if “yes”, complete one activity description for each development on the following chart.)

Demolition/Disposition Activity Description
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)
5. Number of units affected:
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

- (1) ☒ Yes ☐ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

(2) Program Description

a. Size of Program

- ☐ Yes ☒ No: Will the PHA limit the number of families participating in the Section 8 homeownership option?

If the answer to the question above was yes, what is the maximum number of participants this fiscal year?

b. PHA established eligibility criteria

- ☐ Yes ☒ No: Will the PHA’s program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria? If yes, list criteria below:

c. What actions will the PHA undertake to implement the program this year (list)?

(3) Capacity of the PHA to Administer a Section 8 Homeownership Program

The PHA has demonstrated its capacity to administer the program by (select all that apply):

- a. ☒ Establishing a minimum homeowner down payment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family’s resources.
- b. ☒ Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards. Prime lenders are approved through HUD or FDIC to fund V.A., FHA, or conventional loans.
- c. ☒ Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below). HUD approved counseling agencies:
- Neighbor Housing Services—10 years
 - Inland Fair Housing and Mediation—12 years
 - Springboard—3 years
- d. ☒ Demonstrating that it has other relevant experience (list experience below).
- Staff includes a licensed real estate broker with over 25 years experience
 - Staff includes a realtor with 15 years experience

8. Civil Rights Certifications

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

[24 CFR Part 903.12 (b), 903.7 (r)]

A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan

(Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2000 - 2004.

The Housing Authority of the County of San Bernardino made excellent progress in meeting its 5-year plan goals and in accomplishing its mission. We gained 100 Housing Choice vouchers through the opt-out program.

Over the past 12 months, we have increased our non-HUD affordable housing stock through acquisition of 48 units and through the receipt of 257 units from a private non-profit entity.

In FY 2003 we achieved high performer status in PHAS with a score of 96 percent. As of April 12, 2004, we have not received our 09/30/2003 (FY 2003) SEMAP score; however, we anticipate a high performer designation.

Our efforts to deconcentrate poverty in HUD conventional developments have been successful and have provided a good balance of lower and higher income families. Three more developments are better balanced and 23 developments show an increase in average incomes over last year. Partnerships with community service providers, nonprofit organizations, and local universities have resulted in successful self-sufficiency training programs for our residents. We have received a second \$500,000 Resident Opportunity and Self-Sufficiency grant to help fund our Welfare-to-Work programs.

Under the Section 8 Homeownership Program, a total of 11 families have closed escrow. The HUD Special Applications Center approved our Public Housing Homeownership application under 24 CFR 906, and 14 low-income families have closed escrow under this program.

9. Additional Information

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

- a. Substantial Deviation from the 5-Year Plan
- b. Significant Amendment or Modification to the Annual Plan

The Housing Authority of the County of San Bernardino will utilize the following definition of “Substantial Deviation from the 5-Year Plan” and “Significant Amendment or Modification.”

- a. Changes to rent or admissions policies or organization of the waiting list;
- b. Additions of non-emergency work (items not included in the Annual Statement or 5-Year Action Plan) or change in use of replacement reserve funds under the Capital Fund; and
- c. Any changes with regard to demolition or disposition, designation, homeownership programs or conversion activities.

An exception to this definition will be made for any of the above that are adopted to reflect changes in HUD regulatory requirements.

9. Additional Information

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

- a. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s? If yes, provide the comments below:

- Consider purchasing units for lease to Section 8 families
- Offer credit repair training
- Enforce the eviction of bad tenants
- Offer drug counseling to residents
- Replace private management companies with Housing Authority staff
- Hold absent Section 8 landlords accountable
- Establish a beautification program for Section 8 properties
- Provide vocational landscape maintenance training
- Assist with Section 8 lease deposits

- b. In what manner did the PHA address those comments? (select all that apply)

- ☒ Considered comments, but determined that no changes to the PHA Plan were necessary.
☐ The PHA changed portions of the PHA Plan in response to comments
List changes below:

- ☒ Other: (list below)
- Due to funding shortfalls, the PHA is not considering the purchase units for lease to Section 8 families
 - The PHA informed the Board of its current activities and programs that addressed their concerns, and the PHA will increase communication efforts
 - The PHA offers credit repair service through the Homeownership program
 - Bad tenants are evicted on one-strike criteria. The criminal history is checked for all tenants on the lease
 - Drug counseling is available to all tenants
 - The PHA has replaced private management with PHA staff for 508 units since 2003
 - Absent Section 8 landlords are accountable to local code compliance
 - Beautification of Section 8 properties is the responsibility of property owners
 - Customized classes can be offered for vocational training
 - Assistance is available for Section 8 lease deposits through the TBA program in applicable areas

9. Additional Information

C. Other Information

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

☒ Yes ☐ No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board: Loretta Guillen and Jessie Munoz

Method of Selection:

☐ Appointment

The term of appointment is (include the date term expires): 7/1/2005

☐ Election by Residents (if checked, complete next section--Description of Resident Election Process)

Description of Resident Election Process

Nomination of candidates for place on the ballot: (select all that apply)

- ☐ Candidates were nominated by resident and assisted family organizations
- ☐ Candidates could be nominated by any adult recipient of PHA assistance
- ☐ Self-nomination: Candidates registered with the PHA and requested a place on ballot
- ☐ Other: (describe)

Eligible candidates: (select one)

- ☐ Any recipient of PHA assistance
- ☐ Any head of household receiving PHA assistance
- ☒ Any adult recipient of PHA assistance
- ☐ Any adult member of a resident or assisted family organization
- ☐ Other (list)

Eligible voters: (select all that apply)

- ☐ All adult recipients of PHA assistance (public housing and Section 8 tenant-based assistance)
- ☐ Representatives of all PHA resident and assisted family organizations
- ☐ Other (list)

9. Additional Information

C. Other Information

(2) Resident Membership on PHA Governing Board

b. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not?

☐ The PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis

☐ The PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.

☐ Other (explain):

Date of next term expiration of a governing board member: 7/1/2004

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position):

Appointing Officials:

1 st District	Bill Postmus
2 nd District	Paul Biane
3 rd District	Dennis Hansberger
4 th District	Patti Aguiar
5 th District	Clifford Young

Supervisor Postmus will be appointing a new commissioner in July 2004.

9. Additional Information

C. Other Information

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

Consolidated Plan jurisdiction: (County of San Bernardino)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Consolidated Plan jurisdiction: (City of San Bernardino)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

9. Additional Information

C. Other Information

(3) PHA Statement of Consistency with the Consolidated Plan

Consolidated Plan jurisdiction: (City of Fontana)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Consolidated Plan jurisdiction: (City of Ontario)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

9. Additional Information

C. Other Information

(3) PHA Statement of Consistency with the Consolidated Plan

Consolidated Plan jurisdiction: (City of Chino)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Consolidated Plan jurisdiction: (City of Rancho Cucamonga)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

9. Additional Information

C. Other Information

(3) PHA Statement of Consistency with the Consolidated Plan

Consolidated Plan jurisdiction: (City of Victorville)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Consolidated Plan jurisdiction: (City of Rialto)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

9. Additional Information

C. Other Information

(3) PHA Statement of Consistency with the Consolidated Plan

Consolidated Plan jurisdiction: (City of Hesperia)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Consolidated Plan jurisdiction: (Town of Apple Valley)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

- ☒ The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☒ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- ☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

(4) (Reserved)

Use this section to provide any additional information requested by HUD.

10. Project-Based Voucher Program

a. ☒ Yes ☐ No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.

b. ☒ Yes ☐ No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- ☐ Low utilization rate for vouchers due to lack of suitable rental units
☒ Access to neighborhoods outside of high poverty areas
☐ Other (describe below:)

c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

Census Tract	Units	Location
42	51	Arrowhead Woods, San Bernardino
109	40	Twin Peaks
99.03	46	Victorville
29	68	Fontana
2.01	48	Montclair
87.02	96	Yucaipa

11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

PHAs are to indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
<input checked="" type="checkbox"/>	PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
<input checked="" type="checkbox"/>	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
<input checked="" type="checkbox"/>	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
<input checked="" type="checkbox"/>	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA's public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
<input checked="" type="checkbox"/>	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
<input checked="" type="checkbox"/>	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
<input type="checkbox"/>	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Public housing rent determination policies, including the method for setting public housing flat rents. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	Schedule of flat rents offered at each public housing development. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
<input checked="" type="checkbox"/>	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
<input checked="" type="checkbox"/>	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
<input type="checkbox"/>	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
<input type="checkbox"/>	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
<input checked="" type="checkbox"/>	Public housing grievance procedures <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
<input checked="" type="checkbox"/>	Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
<input checked="" type="checkbox"/>	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
<input type="checkbox"/>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
<input type="checkbox"/>	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
<input checked="" type="checkbox"/>	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
<input type="checkbox"/>	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
<input type="checkbox"/>	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
<input type="checkbox"/>	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
<input checked="" type="checkbox"/>	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
<input checked="" type="checkbox"/>	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
<input checked="" type="checkbox"/>	Policies governing any Section 8 Homeownership program (Section 20-H of the Section 8 Administrative Plan)	Annual Plan: Homeownership
<input checked="" type="checkbox"/>	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy
<input checked="" type="checkbox"/>	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
<input type="checkbox"/>	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
<input type="checkbox"/>	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-04			Federal FY of Grant: 2004
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$800,000.00	-	-	-
3	1408 Management Improvements	364,500.00	-	-	-
4	1410 Administration	400,000.00	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	200,000.00	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	730,500.00	-	-	-
10	1460 Dwelling Structures	705,698.00	-	-	-
11	1465.1 Dwelling Equipment—Nonexpendable	155,000.00	-	-	-
12	1470 Nondwelling Structures	290,000.00	-	-	-
13	1475 Nondwelling Equipment	50,000.00	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	10,000.00	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	320,000.00	-		
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$ 4,025,698.00	-		
22	Amount of line 21 Related to LBP Activities	25,000.00	-		
23	Amount of line 21 Related to Section 504 compliance	47,735.94	-		
24	Amount of line 21 Related to Security – Soft Costs	14,850.00	-		
25	Amount of Line 21 Related to Security – Hard Costs	615,500.00			
26	Amount of line 21 Related to Energy Conservation Measures	318,239.60			

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-04 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
19-001	Security Lighting	1450.00	48	\$15,500.00				
19-002	Security Lighting	1450.00	250	85,000.00				
	Security Fencing	1450.00	250	100,000.00				
19-003	Concrete	1450.00	100	75,000.00				
19-005	Security Lighting	1450.00	85	15,000.00				
19-006	Security Lighting	1450.00	50	25,000.00				
19-008	Security Lighting	1450.00	45	15,000.00				
19-009	Security Lighting	1450.00	20	5,000.00				
19-013	Security Lighting	1450.00	89	25,000.00				
19-024	Security Lighting	1450.00	10	25,000.00				
19-025	Security Lighting	1450.00	10	25,000.00				
19-026	Security Lighting	1450.00	10	25,000.00				
19-027	Security Lighting	1450.00	10	25,000.00				
19-028	Security Lighting	1450.00	10	25,000.00				
19-029	Security Lighting	1450.00	10	25,000.00				
19-030	Security Lighting	1450.00	10	25,000.00				
19-031	Security Lighting	1450.00	29	75,000.00				
19-032	Re-pipe water supply	1460.00	20	125,000.00				
	Security Lighting	1450.00	4	5,000.00				
	Garage doors	1450.00	12	10,000.00				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-04 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Vacancy Reduction Activities							
	LBP Abatement	1460.00	10	\$25,000.00				
	Modernize Units	1460.00	100	445,698.00				
	Roofing	1460.00	10	35,000.00				
	Concrete	1450.00	50	25,000.00				
	Fencing	1450.00	50	25,000.00				
	Landscaping / Grading	1450.00	200	50,000.00				
	Security Lighting	1450.00	100	5,000.00				
	Water Heaters	1465.10	50	30,000.00				
	Evaporative Coolers / ACs	1465.10	50	50,000.00				
	Wall Furnaces / FAUs	1465.10	50	50,000.00				
	Flooring	1460.00	50	50,000.00				
	Window Treatments	1460.00	50	25,000.00				
	Replace Stoves / etc.	1465.10	100	25,000.00				
	Non-Dwelling Structures	1470.00		290,000.00				
	Non-Dwelling Equipment	1475.00		50,000.00				
	Operations	1406.00		800,000.00				
	Fees & Costs	1430.00		200,000.00				
	Relocation	1495.10		10,000.00				
	Contingency	1502.00		320,000.00				
	Administration	1410.00		400,000.00				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-04 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Family Self-Sufficiency	1408.00		\$81,000.00				
	Fair Housing	1408.00		12,500.00				
	Economic Development	1408.00		135,000.00				
	Homeownership	1408.00		72,000.00				
	Staff Development	1408.00		25,000.00				
	Security	1408.00		27,000.00				
	PHAS Reporting System Upgrade	1408.00		12,000.00				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: Housing Authority of the County of San Bernardino			Grant Type and Number Capital Fund Program No: CA016-P019-501-04 Replacement Housing Factor No:			Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
19-001	March 2006			September 2007			
19-002	March 2006			September 2007			
19-003	March 2006			September 2007			
19-005	March 2006			September 2007			
19-006	March 2006			September 2007			
19-008	March 2006			September 2007			
19-009	March 2006			September 2007			
19-013	March 2006			September 2007			
19-024	March 2006			September 2007			
19-025	March 2006			September 2007			
19-026	March 2006			September 2007			
19-027	March 2006			September 2007			
19-028	March 2006			September 2007			
19-029	March 2006			September 2007			
19-030	March 2006			September 2007			
19-031	March 2006			September 2007			
19-032	March 2006			September 2007			
PHA Wide	March 2006			September 2007			

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-502-03			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:) 1 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 31-Mar-04 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	\$134,000.00	\$134,000.00	\$73,300.00	\$37,445.42
4	1410 Administration	-	10,700.00	10,700.00	10,700.00
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	50,000.00	50,000.00	50,000.00	25,418.86
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	370,500.00	370,500.00	-	-
10	1460 Dwelling Structures	156,804.00	156,804.00	-	-
11	1465.1 Dwelling Equipment—Nonexpendable	50,500.00	50,500.00	-	-
12	1470 Nondwelling Structures	20,000.00	20,000.00	-	-
13	1475 Nondwelling Equipment	25,000.00	25,000.00	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$ 806,804.00	\$ 806,804.00	\$134,000.00	\$73,564.28
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 compliance	17,334.12	17,334.12	-	-
24	Amount of line 21 Related to Security – Soft Costs	5,360.00	4,932.00	2,932.00	1,497.82
25	Amount of Line 21 Related to Security – Hard Costs	344,500.00	344,500.00	-	-
26	Amount of line 21 Related to Energy Conservation Measures	115,560.80	115,560.80	-	-

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

[illegible]

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-502-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	LBP Abatement	1460.00	0	-	-			
	Modernize Units	1460.00	125	\$90,804.00	\$90,804.00			Ongoing
	Roofing	1460.00	3	10,000.00	10,000.00			Ongoing
	Concrete	1450.00	15	10,000.00	10,000.00			Ongoing
	Fencing	1450.00	15	10,000.00	10,000.00			Ongoing
	Landscaping / Grading	1450.00	50	20,000.00	20,000.00			Ongoing
	Security Lighting	1450.00	25	2,500.00	2,500.00			Ongoing
	Water Heaters	1465.10	15	7,000.00	7,000.00			Ongoing
	Evaporative Coolers / ACs	1465.10	15	11,000.00	11,000.00			Ongoing
	Wall Furnaces / FAUs	1465.10	15	12,000.00	12,000.00			Ongoing
	Flooring	1460.00	15	12,000.00	12,000.00			Ongoing
	Window Treatments	1460.00	15	10,000.00	10,000.00			Ongoing
	Replace Stoves / etc.	1465.10	25	7,500.00	7,500.00			Ongoing
	Non-Dwelling Structures	1470.00		15,000.00	15,000.00			Ongoing
	Non-Dwelling Equipment	1475.00		25,000.00	25,000.00			Ongoing
	Operations	1406.00						
	Fees & Costs	1430.00		50,000.00	50,000.00	\$50,000.00	\$25,418.86	Ongoing
	Relocation	1495.10		-	-			
	Contingency	1502.00		-	-			
	Administration	1410.00		-	10,700.00	10,700.00	10,700.00	Ongoing

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-502-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Family Self-Sufficiency	1408.00		\$16,000.00	\$16,000.00	\$16,000.00	\$14,895.33	Ongoing
	Welfare Reform Initiatives	1408.00		25,000.00	25,000.00			Ongoing
	Fair Housing	1408.00		4,500.00	4,500.00	4,500.00		Ongoing
	Economic Development	1408.00		27,000.00	16,300.00	1,300.00	506.84	Ongoing
	Homeownership	1408.00		14,500.00	14,500.00	14,500.00	12,514.04	Ongoing
	Resident Management Training	1408.00		5,000.00	5,000.00			Ongoing
	Staff Development	1408.00		10,000.00	10,000.00	10,000.00	3,954.39	Ongoing
	Security	1408.00		5,500.00	5,500.00	5,500.00	3,789.58	Ongoing
	Tenant Accounting System Upgrade	1408.00		7,500.00	7,500.00	7,500.00		Ongoing
	Inventory Management System	1408.00		4,500.00	4,500.00	4,500.00		Ongoing
	Preventive Maintenance Evaluation	1408.00		7,500.00	7,500.00	7,500.00		Ongoing
	Human Resources Program	1408.00		2,500.00	2,500.00	2,500.00		Ongoing
	PHAS Reporting System Upgrade	1408.00		4,500.00	4,500.00	4,500.00	1,785.24	Ongoing

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-03			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:) 2 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 31-Mar-04 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$805,139.00	\$353,612.82-	-	-
3	1408 Management Improvements	665,500.00	665,550.00-	665,550.00	156,938.30
4	1410 Administration	348,000.00	348,000.00	348,000.00	109,732.43
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	217,500.00	217,500.00	217,500.00	100,840.85
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	545,925.00	526,974.63	527,974.63	184,924.41
10	1460 Dwelling Structures	702,943.30	1,388,285.01	1,388,285.01	1,123,012.47
11	1465.1 Dwelling Equipment—Nonexpendable	214,135.70	326,078.87	326,078.87	266,918.87
12	1470 Nondwelling Structures	87,000.00	87,000.00	87,000.00	16,847.91
13	1475 Nondwelling Equipment	108,750.00	103,996.67	103,996.67	3,996.67
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	8,700.00	8,700.00	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	322,055.00	-	-	-
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$ 4,025,698.00	\$4,025,698.00	\$3,663,385.18	\$1,963,211.91
22	Amount of line 21 Related to LBP Activities	43,500.00	13,035.43	13,035.43	13,035.43
23	Amount of line 21 Related to Section 504 compliance	43,890.12	67,240.16	67,240.16	47,245.67
24	Amount of line 21 Related to Security – Soft Costs	26,622.00	26,622.00	26,622.00	6,277.53
25	Amount of Line 21 Related to Security – Hard Costs	432,825.00	425,378.65	425,378.65	109,428.43
26	Amount of line 21 Related to Energy Conservation Measures	292,600.80	448,267.70	448,267.70	314,971.15

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	LBP Abatement	1460.00	10	\$43,500.00	\$13,035.43	\$13,035.43	\$13,035.43	Ongoing
	Modernize Units	1460.00	100	375,605.80	891,860.54	891,860.54	774,488.00	Ongoing
	Roofing	1460.00	10	43,500.00	70,000.00	70,000.00	70,000.00	Ongoing
	Concrete	1450.00	50	43,500.00	30,400.00	30,400.00	30,400.00	Ongoing
	Fencing	1450.00	50	43,500.00	7,187.12	7,187.12	7,187.12	Ongoing
	Landscaping / Grading	1450.00	200	87,000.00	39,137.10	39,137.10	39,137.10	Ongoing
	Security Lighting	1450.00	100	10,875.00	32,219.13	32,219.13	32,219.13	Ongoing
	Water Heaters	1465.10	50	28,608.20	41,831.66	41,831.66	41,831.66	Ongoing
	Evaporative Coolers / ACs	1465.10	50	46,980.00	53,542.78	53,542.78	53,542.78	Ongoing
	Wall Furnaces / FAUs	1465.10	50	48,937.50	130,104.71	130,104.71	130,104.71	Ongoing
	Flooring	1460.00	50	48,937.50	176,566.36	176,566.36	176,566.36	Ongoing
	Window Treatments	1460.00	50	43,500.00	51,022.40	51,022.40	51,022.40	Ongoing
	Replace Stoves / etc.	1465.10	100	30,450.00	41,439.72	41,439.72	41,439.72	Ongoing
	Non-Dwelling Structures	1470.00		65,250.00	65,250.00	65,250.00	16,847.91	Ongoing
	Non-Dwelling Equipment	1475.00		108,750.00	103,996.67	103,996.67	3,996.67	Ongoing
	Operations	1406.00		805,139.00	353,612.82			Ongoing
	Fees & Costs	1430.00		217,500.00	217,500.00	217,500.00	100,840.85	Ongoing
	Relocation	1495.10		8,700.00	8,700.00	8,700.00	8,700.00	Ongoing
	Contingency	1502.00		322,055.00	-	-	-	Repro- grammed
	Administration	1410.00		348,000.00	348,000.00	348,000.00	109,732.43	Ongoing
	Emergency Site Repair	1450.00			56,981.28	56,981.28	56,981.28	Ongoing
	Emergency Dwelling Repair	1460.00			37,900.28	37,900.28	37,900.28	Ongoing

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Housing Authority of the County of San Bernardino		Grant Type and Number Capital Fund Program Grant No: CA16-P019-501-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Family Self-Sufficiency	1408.00		\$70,470.00	\$70,470.00	\$70,470.00	\$45,652.36	Ongoing
	Welfare Reform Initiatives	1408.00		195,750.00	195,750.00	195,750.00	69,357.25	Ongoing
	Fair Housing	1408.00		19,575.00	19,575.00	19,575.00		Ongoing
	Economic Development	1408.00		117,450.00	117,450.00	117,450.00	23,659.21	Ongoing
	Homeownership	1408.00		62,640.00	62,640.00	62,640.00	15,654.98	Ongoing
	Resident Management Training	1408.00		23,490.00	23,490.00	23,490.00		Ongoing
	Staff Development	1408.00		39,150.00	39,150.00	39,150.00		Ongoing
	Security	1408.00		23,490.00	23,490.00	23,490.00		Ongoing
	Tenant Accounting System Upgrade	1408.00		31,320.00	31,320.00	31,320.00		Ongoing
	Inventory Management System	1408.00		19,575.00	19,575.00	19,575.00		Ongoing
	Preventive Maintenance Evaluation	1408.00		31,320.00	31,320.00	31,320.00	2,614.50	Ongoing
	Human Resources Program	1408.00		11,745.00	11,745.00	11,745.00		Ongoing
	PHAS Reporting System Upgrade	1408.00		19,575.00	19,575.00	19,575.00		Ongoing

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

[illegible]

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Housing Authority of the County of San Bernardino				<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 9/30/2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 9/30/2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 9/30/2007	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 9/30/2008
CA16-P019-001	See	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-002	Annual	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-003	Statement	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-004		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-005		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-006		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-007		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-008		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-009		Part of PHA Wide Activities	Part of PHA Wide Activities	\$37,600.00	Part of PHA Wide Activities
CA16-P019-010		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-012		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-013		Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities	Part of PHA Wide Activities
CA16-P019-017 (a)					
CA16-P019-017 (b)		\$6,840.00	\$14,478.00		\$22,630.00
CA16-P019-018 (a)					
CA16-P019-018 (b)			39,500.00	55,500.00	
CA16-P019-019					
CA16-P019-020			7,500.00		
CA16-P019-021					
CA16-P019-022					
CA16-P019-023		31,625.00		12,500.00	
CA16-P019-024		17,125.00	19,500.00	\$12,500.00	
CA16-P019-025		\$7,425.00	\$50,000.00		
CA16-P019-026					
CA16-P019-027			\$25,000.00		
CA16-P019-028					
CA16-P019-029		\$17,250.00			
CA16-P019-030				\$42,525.00	

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Housing Authority of the County of San Bernardino				<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 9/30/2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 9/30/2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 9/30/2007	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 9/30/2008
CA16-P019-031 (a)	See				
CA16-P019-031 (b)	Annual	24,000.00	23,000.00		\$19,845.00
CA16-P019-031 (c)	Statement	46,000.00	23,000.00		19,095.00
CA16-P019-031 (d)		22,880.00	11,000.00		10,800.00
CA16-P019-031 (e)		111,870.00		25,500.00	
CA16-P019-031 (f)					
CA16-P019-032 (a)				12,000.00	
CA16-P019-032 (b)					
CA16-P019-032 (c)				75,000.00	
CA16-P019-032 (d)			50,500.00		
CA16-P019-032 (e)		10,625.00	39,075.00		
CA16-P019-034 (a)		27,875.00			82,485.00
CA16-P019-034 (b)		19,250.00	17,950.00		18,640.00
CA16-P019-034 (c)					
CA16-P019-035 (a)			15,800.00	\$17,000.00	
CA16-P019-035 (b)			17,500.00		12,060.00
CA16-P019-035 (c)		\$62,495.00	\$15,000.00		\$57,575.00
CA16-P019-035 (d)		\$10,250.00	\$6,200.00		
CA16-P019-035 (e)		16,940.00	27,450.00	\$38,250.00	\$38,200.00
CA16-P019-036 (a)		11,925.00	25,500.00		19,295.00
CA16-P019-036 (b)		12,850.00		15,000.00	
CA16-P019-042 (a)					
CA16-P019-042 (b)					
CA16-P019-042 (c)					
CA16-P019-042 (d)					

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Housing Authority of the County of San Bernardino				<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 9/30/2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 9/30/2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 9/30/2007	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 9/30/2008
Non-Dwelling Structures & Equip	See	225,000.00	225,000.00	225,000.00	225,000.00
Administration	Annual	400,000.00	400,000.00	400,000.00	400,000.00
Other	Statement	530,000.00	530,000.00	530,000.00	530,000.00
Operations		800,000.00	800,000.00	800,000.00	800,000.00
PHA Wide		987,973.00	1,003,745.00	824,323.00	1,005,073.00
PHA Maintenance Improvements		625,500.00	639,000.00	915,500.00	765,000.00
CFP Funds Listed for 5-year planning		\$4,025,698.00	\$4,025,698.00	\$4,025,698.00	\$4,025,698.00
Replacement Housing Factor Funds		-	-	-	-

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : 2005 FFY Grant: 2005 PHA FY: 9/30/2005			Activities for Year: 2006 FFY Grant: 2006 PHA FY: 9/30/2006		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	CA16P019-017(b) -7 Units	Entry Doors & Screens	\$6,840.00	CA16P019-017(b) –7 Units	Flooring	\$10,500.00
Annual	CA16P019-023 -9 Units	Evap. Coolers	10,800.00		Rain Gutters	3,978.00
Statement		Replace Interior Doors	12,500.00	CA16P019-018(b) –13 Units	Resurface Parking Areas	12,500.00
		Entry Doors & Screens	8,325.00		Replace Windows	27,000.00
	CA16P019-024 -8 Units	Replace Parking Lot	17,125.00	CA16P019-020 –8 Units	Security Fencing	7,500.00
	CA16P019-025 –10 Units	Water Heaters	7,425.00	CA16P019-024 –8 Units	Security Fencing	7,500.00
	CA16P019-029 –10 Units	Replace Parking Lot	17,250.00		Flooring	12,000.00
	CA16P019-031(b) –9 Units	Security Lighting	6,900.00	CA16P019-025 –10 Units	Remodel Bathrooms	50,000.00
		Evap. Coolers	10,350.00	CA16P019-027 –10 Units	Resurface Parking Areas	17,500.00
		Water Heaters	6,750.00		Rain Gutters	7,500.00
	CA16P019-031(c) –9 Units	Evap. Coolers	10,800.00	CA16P019-031(b) –9 Units	Flooring	13,500.00
		Security Lighting	6,900.00		Repair Laundry Rooms	9,500.00
		Fencing	10,300.00	CA16P019-031(c) –9 Units	Flooring	13,500.00
		Water Heaters	6,750.00		Repair Laundry Room	9,500.00
		Wall Furnaces/FAUs	11,250.00	CA16P019-031(d) –10 Units	Repair Laundry Room	8,500.00
	CA16P019-031(d) –10 Units	Security Lighting	2,750.00		Rain Gutters	2,500.00
		Evap. Coolers	11,880.00	CA16P019-032(d) –10 Units	Replace Windows	24,000.00
		Rain Gutters	8,250.00		Replace Driveways	11,625.00
	CA16P019-031(e) –24 Units	Security Lighting	6,600.00		Security Fencing	5,875.00
		Wall Furnaces/FAUs	29,700.00		Flooring	9,000.00
		Water Heaters	17,820.00	CA16P019-032(e) –25 Units	Security Fencing	16,575.00
	CA16P019-032(e) –25 Units	Replace Parking Lot	10,625.00		Flooring	22,500.00
	CA16P019-034(a) –47 Units	Security Lighting	13,000.00	CA16P019-034(b) –8 Units	Replace Parking Lot	5,750.00
		Water Heaters	14,875.00		Replace Exterior Trim	2,000.00
Subtotal CFP Estimated Cost			\$265,765.00			\$310,303.00

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : 2005 FFY Grant: 2005 PHA FY: 9/30/2005			Activities for Year: 2006 FFY Grant: 2006 PHA FY: 9/30/2006		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	CA16P019-034(b) –8 Units	Concrete	\$8,250.00		Replace Windows	\$10,200.00
Annual		Replace Exterior Trim	11,000.00	CA16P019-035(a) –12 Units	Replace Windows	15,800.00
Statement	CA16P019-035(c) –15 Units	Evap. Coolers	17,820.00	CA16P019-035(b) –8 Units	Flooring	12,000.00
		Entry Doors & Screens	15,200.00		Garage Doors	5,500.00
		Wall Furnaces/FAUs	18,450.00	CA16P019-035(c) –15 Units	Replace Windows	15,000.00
		Water Heaters	11,250.00	CA16P019-035(d) –27 Units	Insulate Attics/etc.	6,200.00
	CA16P019-035(d) –27 Units	Exterior Doors	10,250.00	CA16P019-035(e) –8 Units	Resurface Parking Areas	5,250.00
	CA16P019-035(e) –8 Units	Concrete	11,000.00		Flooring	12,000.00
		Water Heaters	5,940.00		Replace Windows	10,200.00
	CA16P019-036(a) –8 Units	Wall Furnaces/FAUs	7,425.00	CA16P019-036(a) –6 Units	Flooring	9,000.00
		Water Heaters	4,500.00		Roofing	16,500.00
	CA16P019-036(b) –13 Units	Entry Doors & Screens	12,850.00			
	PHA Wide	LBP Abatement	41,000.00	PHA Wide	LBP Abatement	86,000.00
		Modernize Units	389,077.00		Modernize Units	331,849.00
		Roofing	50,000.00		Roofing	50,000.00
		Concrete	50,000.00		Concrete	50,000.00
		Fencing	50,000.00		Fencing	50,000.00
		Landscaping/Grading	75,000.00		Landscaping/Grading	100,000.00
		Security Lights	29,796.00		Security Lights	32,796.00
		Water Heaters	33,750.00		Water Heaters	33,750.00
		Evap. Coolers/ACs	54,000.00		Evap. Coolers/ACs	54,000.00
		Wall Furnaces/FAUs	56,250.00		Wall Furnaces/FAUs	56,250.00
		Flooring	75,000.00		Flooring	75,000.00
		Window Treatments	49,100.00		Window Treatments	49,100.00
		Replace Stoves/etc.	35,000.00		Replace Stoves/etc.	35,000.00
	Subtotal CFP Estimated Cost		\$1,121,908.00			\$1,121,395.00

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : 2005 FFY Grant: 2005 PHA FY: 9/30/2005			Activities for Year: 2006 FFY Grant: 2006 PHA FY: 9/30/2006		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	PHA Management Improv.	Family Self-Sufficiency	\$108,000.00	PHA Management Improv	Fair Housing	\$22,500.00
		Welfare Reform Init.	45,000.00		Homeownership	126,000.00
		Fair Housing	22,500.00		Staff Development	63,000.00
		Economic Develop.	45,000.00		Welfare Reform Init.	67,500.00
		Homeownership	126,000.00		Economic Development	360,000.00
		Staff Development	67,500.00			
		Resident Programs	67,500.00			
		Computer System Upgr	144,000.00			
	Non-Dwelling Structures & Equipment		225,000.00	Non-Dwelling Structures & Equipment		225,000.00
	Operations		800,000.00	Operations		800,000.00
	Other	Fees and Costs	200,000.00	Other	Fees and Costs	200,000.00
		Relocation	10,000.00		Relocation	10,000.00
		Contingency	320,000.00		Contingency	320,000.00
	Administration		400,000.00	Administration		400,000.00
Subtotal CFP Estimated Cost			\$2,580,500.00			\$2,594,000.00
Total CFP Estimated Cost			\$3,968,173.00			\$4,025,698.00

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year :2007 FFY Grant: 2007 PHA FY: 9/30/2007			Activities for Year: 2008 FFY Grant: 2008 PHA FY: 9/30/2008		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
CA16P019-009 –20 Units	Security Fencing	\$37,600.00	CA16P019-017(b) –7 Units	Entry Doors & Screens	\$5,830.00
CA16P019-019 –24 Units	Replace Windows	55,500.00		Driveways & Sidewalks	16,800.00
CA16P019-024 –8 Units	Evap. Coolers	12,500.00	CA16P019-031(b) –9 Units	Evap. Coolers	9,720.00
CA16P019-030 –10 Units	Replace Windows	42,525.00		Wall Furnaces/FAUs	10,125.00
CA16P019-031(a) –24 Units	Security Fencing	25,500.00	CA16P019-031(c) –9 Units	Evap. Coolers	9,720.00
CA16P019-032(a) –20 Units	Entry Doors & Screens	12,000.00		Security Fencing	9,375.00
CA16P019-032(c) –43 Units	Replace Windows	75,000.00	CA16P019-031(d) –10 Units	Evap. Coolers	10,800.00
CA16P019-035(a) –12 Units	Security Lighting	4,500.00	CA16P019-034(a) –47 Units	Evap. Coolers	50,760.00
	Water Heaters	12,500.00		Water Heaters	31,725.00
CA16P019-035(e) –8 Units	Security Fencing	22,500.00	CA16P019-034(b) –8 Units	Concrete	10,000.00
	Security Lighting	3,250.00		Evap. Coolers	8,640.00
	Evap. Coolers	12,500.00	CA16P019-035(b) –8 Units	Entry Doors & Screens	6,660.00
CA16P019-036(b) –13 Units	Resurface Parking Areas	15,000.00		Water Heaters	5,400.00
PHA Wide	LBP Abatement	50,000.00	CA16P019-035(c) –15 Units	Evap. Coolers	16,200.00
	Modernize Units	262,427.00		Security Fencing	18,750.00
	Roofing	75,000.00		Entry Doors & Screens	12,500.00
	Concrete	50,000.00		Water Heaters	10,125.00
	Fencing	50,000.00	CA16P019-035(e) –8 Units	Concrete	10,000.00
	Landscaping/Grading	89,100.00		Entry Doors & Screens	6,660.00
	Security Lights	32,796.00		Water Heaters	5,400.00
	Water Heaters	33,750.00		Carport Roofing	7,500.00
	Evap. Coolers/ACs	40,000.00		Evap. Coolers	8,640.00
	Wall Furnaces/FAUs	56,250.00	CA16P019-036(a) –6 Units	Replace Interior Doors	3,500.00
	Flooring	50,000.00		Wall Furnaces/FAUs	6,750.00
	Window Treatments	20,000.00		Entry Doors & Screens	4,995.00
	Replace Stoves/etc.	15,000.00		Water Heaters	4,050.00
Subtotal CFP Estimated Cost		\$1,155,198.00			\$300,625.00

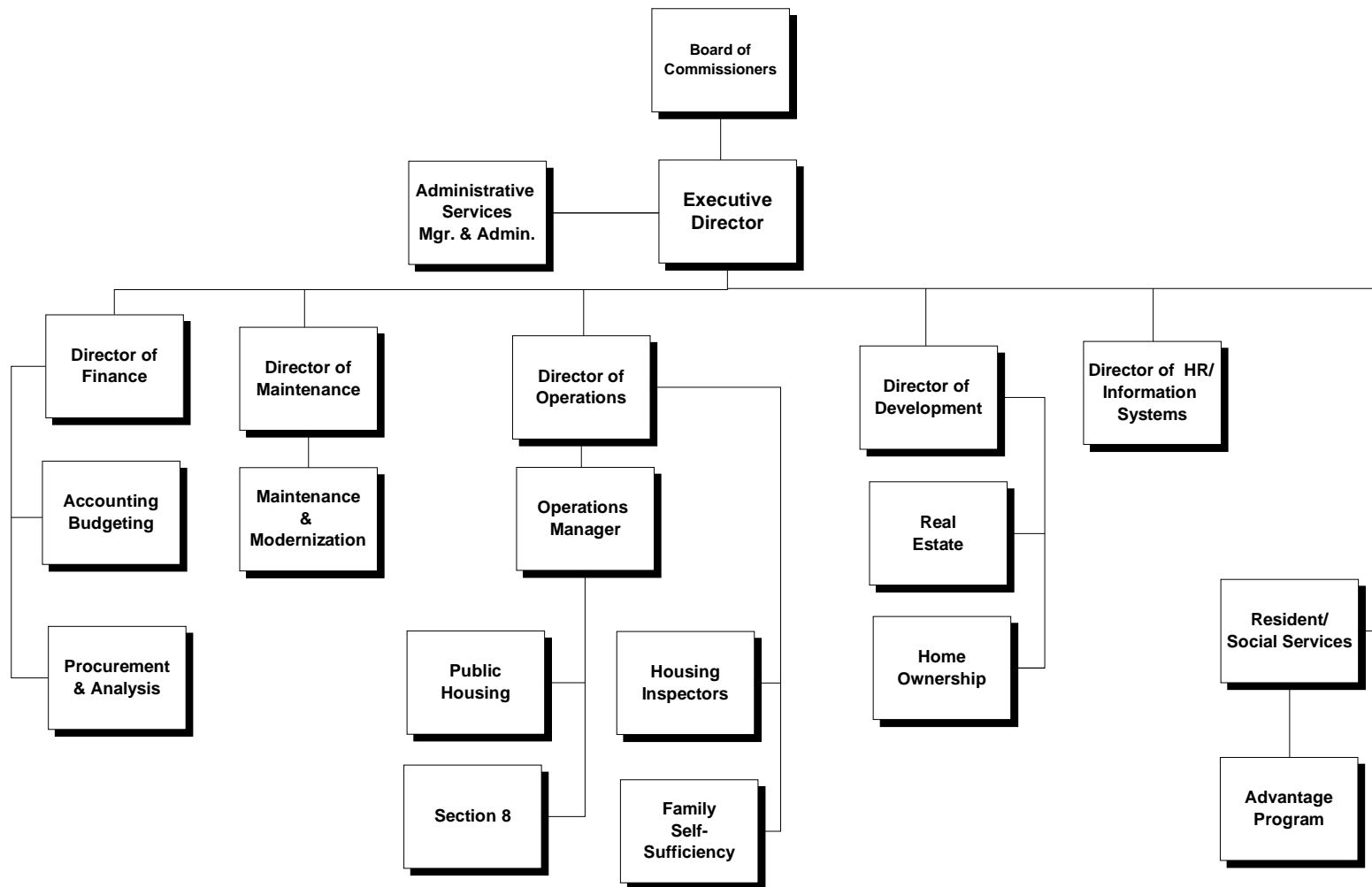
13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year :2007 FFY Grant: 2007 PHA FY: 9/30/2007			Activities for Year: 2008 FFY Grant: 2008 PHA FY: 9/30/2008		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
PHA Management Improv.	Staff Development	\$63,000.00	PHA Wide	LBP Abatement	\$61,000.00
	Economic Develop.	180,000.00		Modernize Units	378,177.00
	Computer System Upgr	90,000.00		Roofing	50,000.00
	Fair Housing	27,000.00		Concrete	50,000.00
	Resident Programs	112,500.00		Fencing	50,000.00
	Drug Elimination	225,000.00		Landscaping/Grading	80,000.00
	Homeownership	108,000.00		Security Lights	32,796.00
	Asset Development	110,000.00		Water Heaters	33,750.00
Non-Dwelling Structures & Equipment		225,000.00		Evap. Coolers/ACs	54,000.00
				Wall Furnaces/FAUs	56,250.00
Operations		800,000.00		Flooring	75,000.00
				Window Treatments	49,100.00
Other	Fees and Costs	200,000.00		Replace Stoves/etc.	35,000.00
	Relocation	10,000.00	PHA Management Improv.	Family Self Sufficiency	81,000.00
	Contingency	320,000.00		Welfare Reform Init.	225,000.00
				Fair Housing	22,500.00
Administration		400,000.00		Economic Development	135,000.00
				Homeownership	72,000.00
				Resident Mgt Training	27,000.00
				Staff Development	45,000.00
				Security	27,000.00
				Tenant Accounting Upgr	36,000.00
				Inventory Mgt System	22,500.00
				Preventative Maint.	36,000.00
				Human Resources Prog.	13,500.00
				PHAS Reporting Upgr	22,500.00
Subtotal CFP Estimated Cost		\$2,870,500.00			\$1,770,073

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year :2007 FFY Grant: 2007 PHA FY: 9/30/2007			Activities for Year: 2008 FFY Grant: 2008 PHA FY: 9/30/2008		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
			Non-Dwelling Structures & Equipment		\$225,000.00
			Operations		800,000.00
			Other	Fees & Costs	200,000.00
				Relocation	10,000.00
				Contingency	320,000.00
			Administration		400,000.00
Subtotal CFP Estimated Cost		\$0			\$1,955,000.00
Total CFP Estimated Cost		\$4,025,698.00			\$4,025,698.00

14. Other: Organization Chart



Housing Authority of the County of San Bernardino
Organization Chart

5/01/04